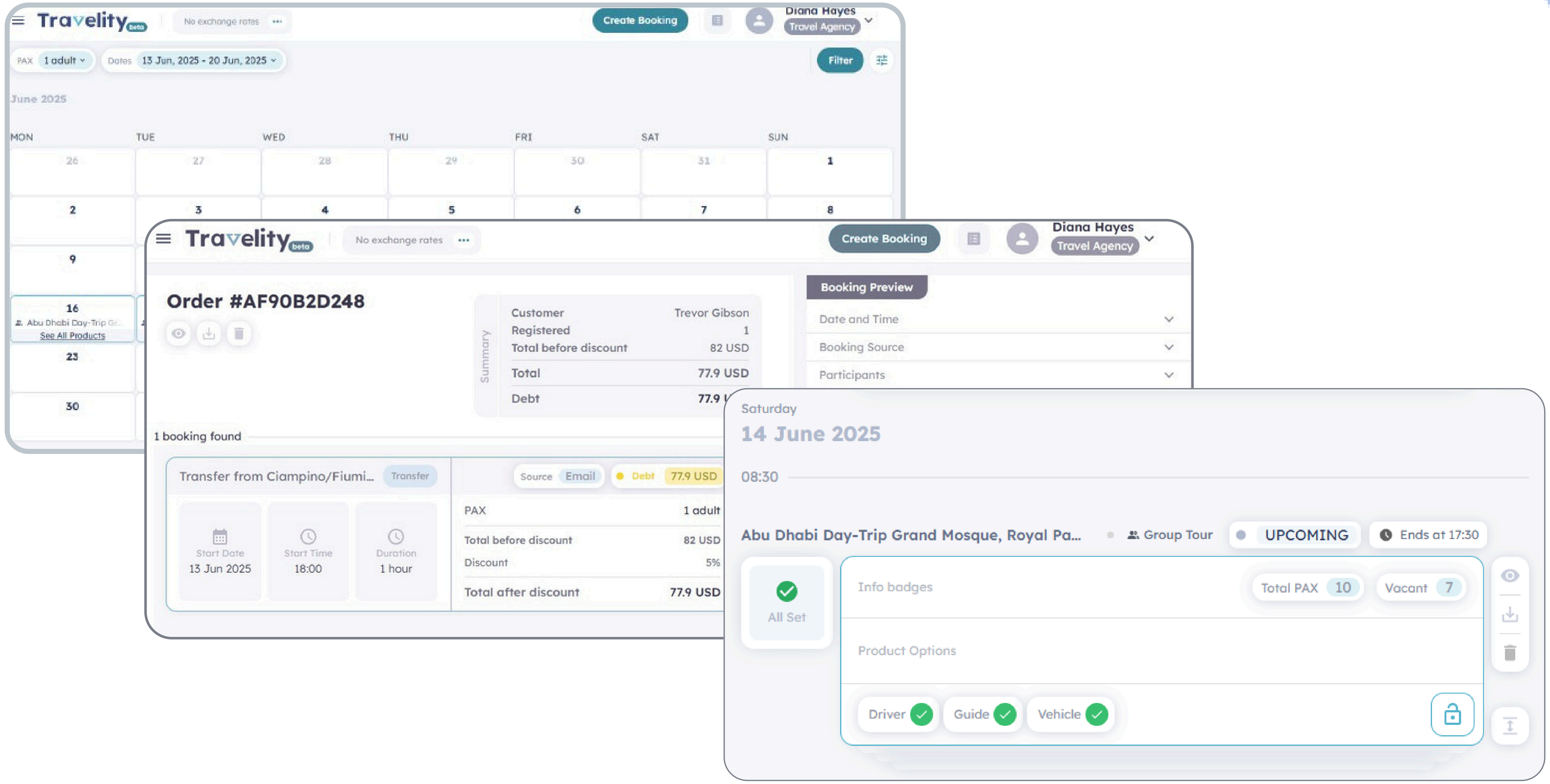
How To Create A Booking In Travelity



Definition of terms

Workspace

A workspace is a tour agent’s working environment where they can manage their tasks, projects, and resources - either individually or as part of a team. Travelity defines 2 types of workspaces:

My Workspace

This is each user’s personal working environment.

Shared Workspace

This is a collaborative space where tour agents work as a team. To access a Shared Workspace, a user must receive an invitation by either the Team Owner or a user with the Administrator role. Each user is invited to a specific team with a defined role, which determines their level of access and permissions within the system.

Product

A Product refers to an available tour listed for sale, with its availability period, vehicle, and capacity set within the system.

Booking

Booking is the reservation of a certain number of guests for a Product. Every booking has a clearly defined date and time, number of people, as well as any additional services.

Events

Events refer to calendar entries. Events section reflects the existing bookings or planned events on the calendar. An Event is created as a result of a Booking, and it is associated with a certain number of Bookings. An Event typically includes information about the time and some operational details.

Order

Order reflects the grouped purchases of a specific customer. This section works on the principle of a shopping cart. Orders have two statuses: Open and Confirmed.

Asset

Assets refer to vehicles or other types of property that are used during the service delivery of an Event.

Staff

Staff refers to the personnel serving the Event, such as drivers, guides, operators responsible for the tour, and tour managers

Team

It is the collaboration among tour agents

Customer

Customer refers to the guest

Availability Calendar

Availability Calendar is a calendar based tool where users can view the offered products and easily check the availability of their preferred products. It includes all services: group tours, individual tours, and transfers.
Filters allow users to adjust searches based on specific criteria: date, number of passengers, service type, and service name.

Through integration with the Channel Manager, the Availability Calendar automatically updates availability, reducing the risk of double bookings.

Guest check-in

Check-In feature is in the Daily view dashboard. This functionality allows tour agents to mark attendees as present or absent. To perform a check-in, tour agent should access the Travelers section of the Event menu, where they can see a list of participants and mark their status.

They can also view the participant's phone number or email address based on the information provided at the time of booking. If users click on the profile icon, they can check if any attachments have been uploaded for the guests.

Daily View

The Daily View section is designed to provide tour agents with a clear, daily overview of routes and bookings. This section simplifies team collaboration by serving as a shared page where all team members can simultaneously view all events.

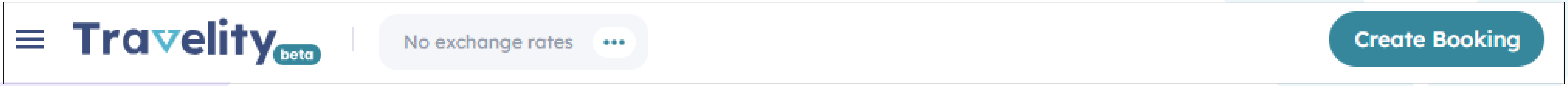
The Daily View allows users to see all events planned for the current day or upcoming days. The ability to filter by date and product helps users quickly find the necessary event.

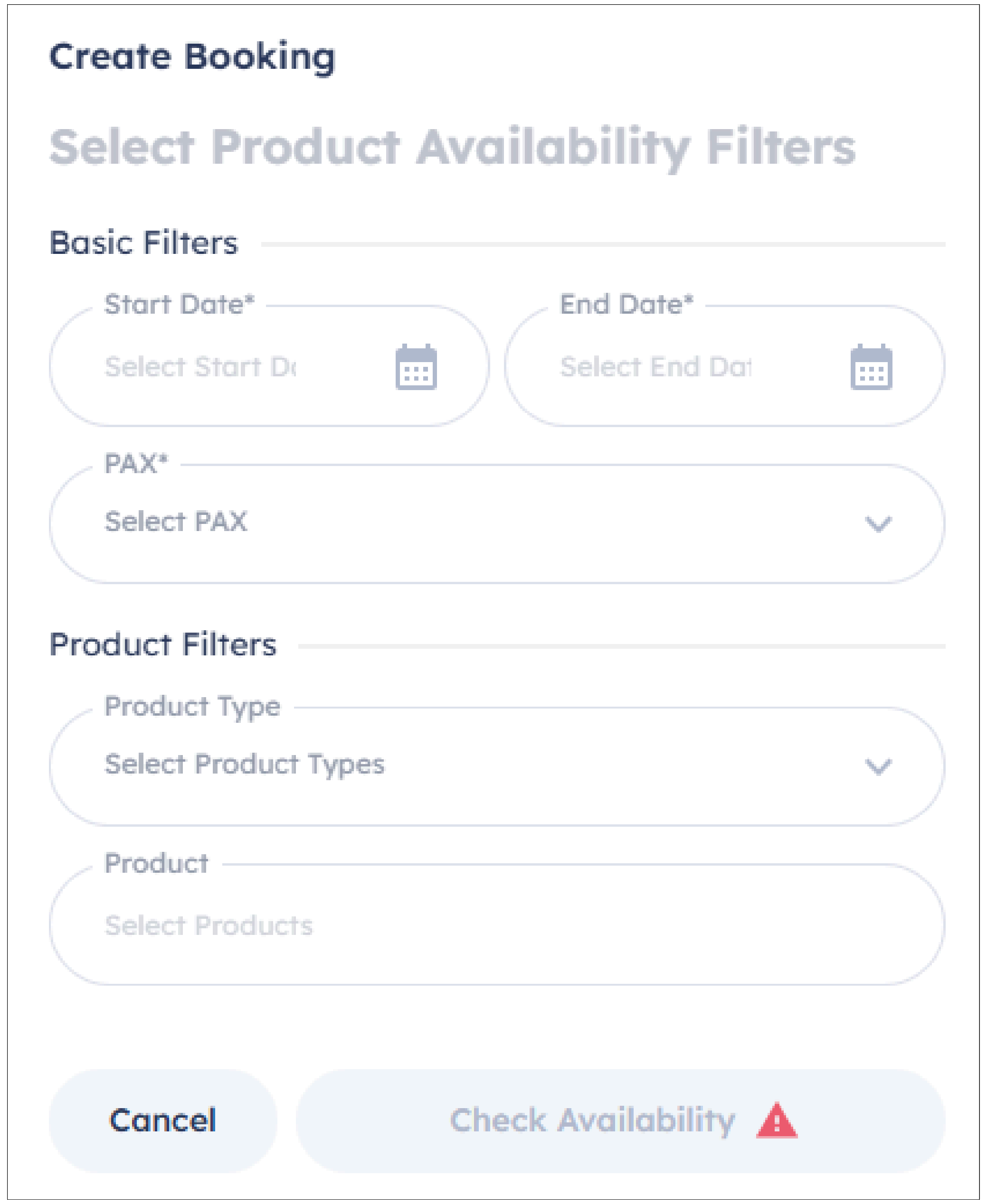
In this section, the assigned guide, driver, and the vehicle designated for the event are displayed.

How to Make a Booking?

Using the **Create Booking** Button

While this button also leads to the **Availability Calendar**, it allows you to set filters beforehand. All available filters are shown in a single view, making it easier to predefine your search criteria and streamline the booking process.





After selecting the available time from **Availability Calendar**, the booking creation modal will open.

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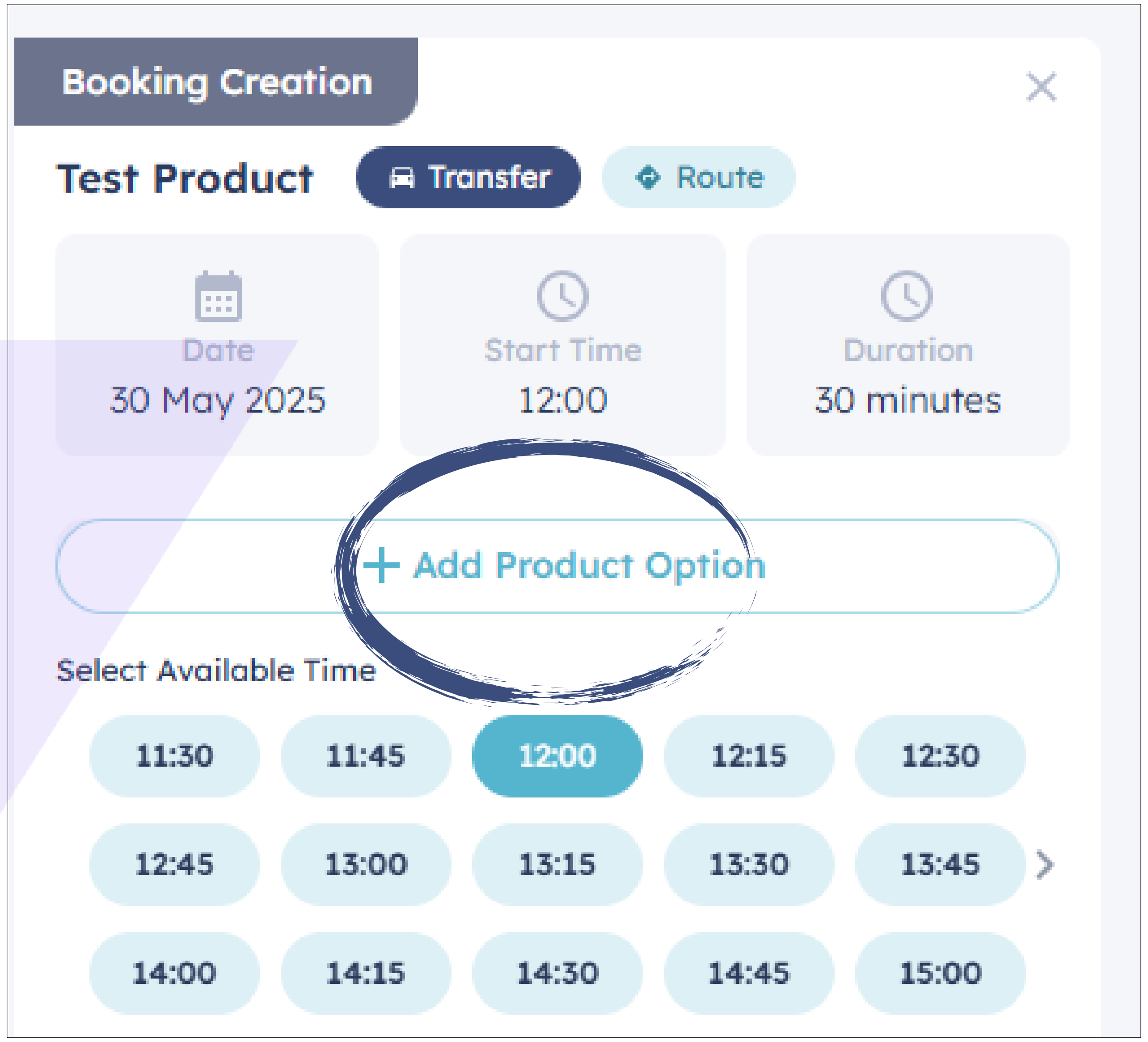

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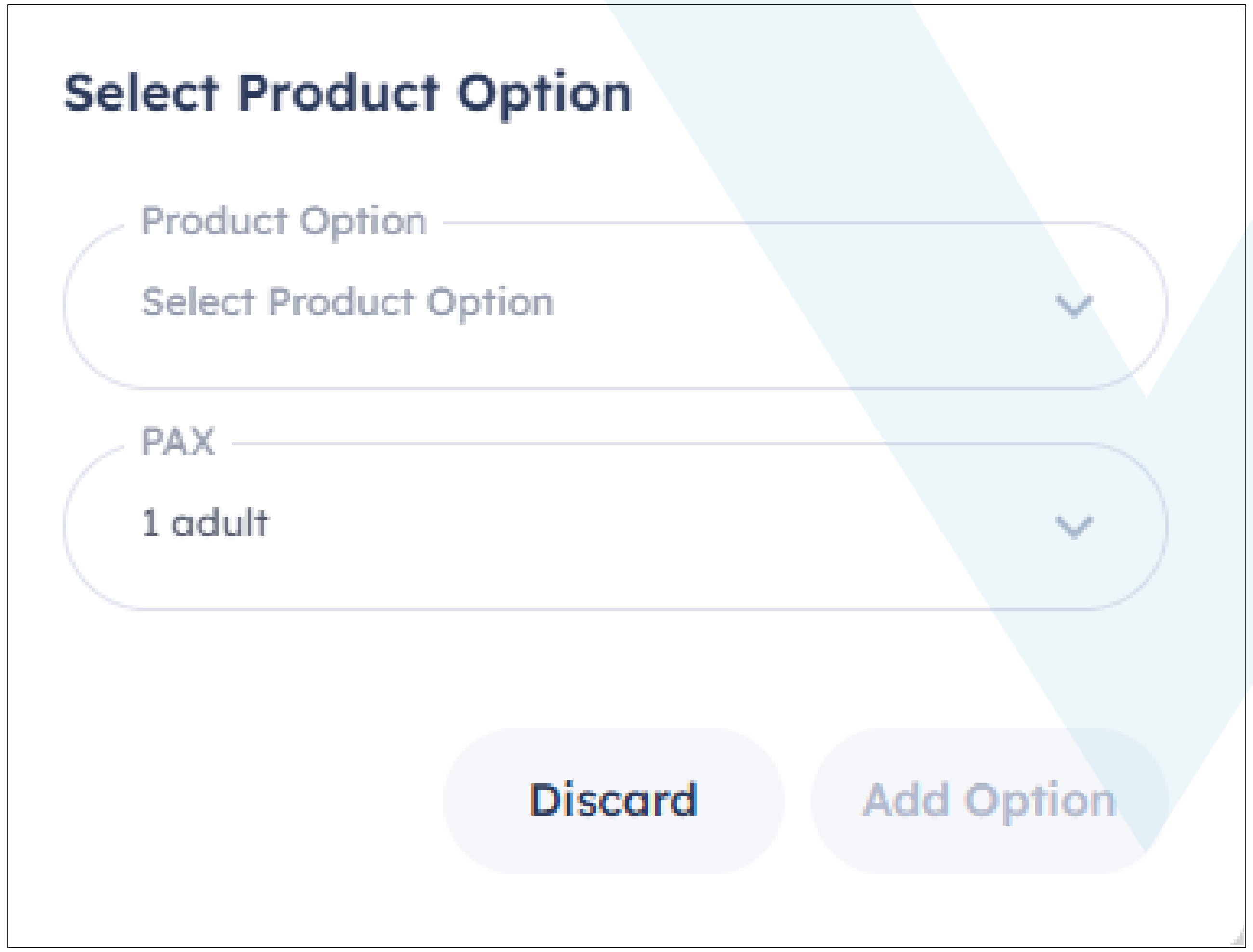
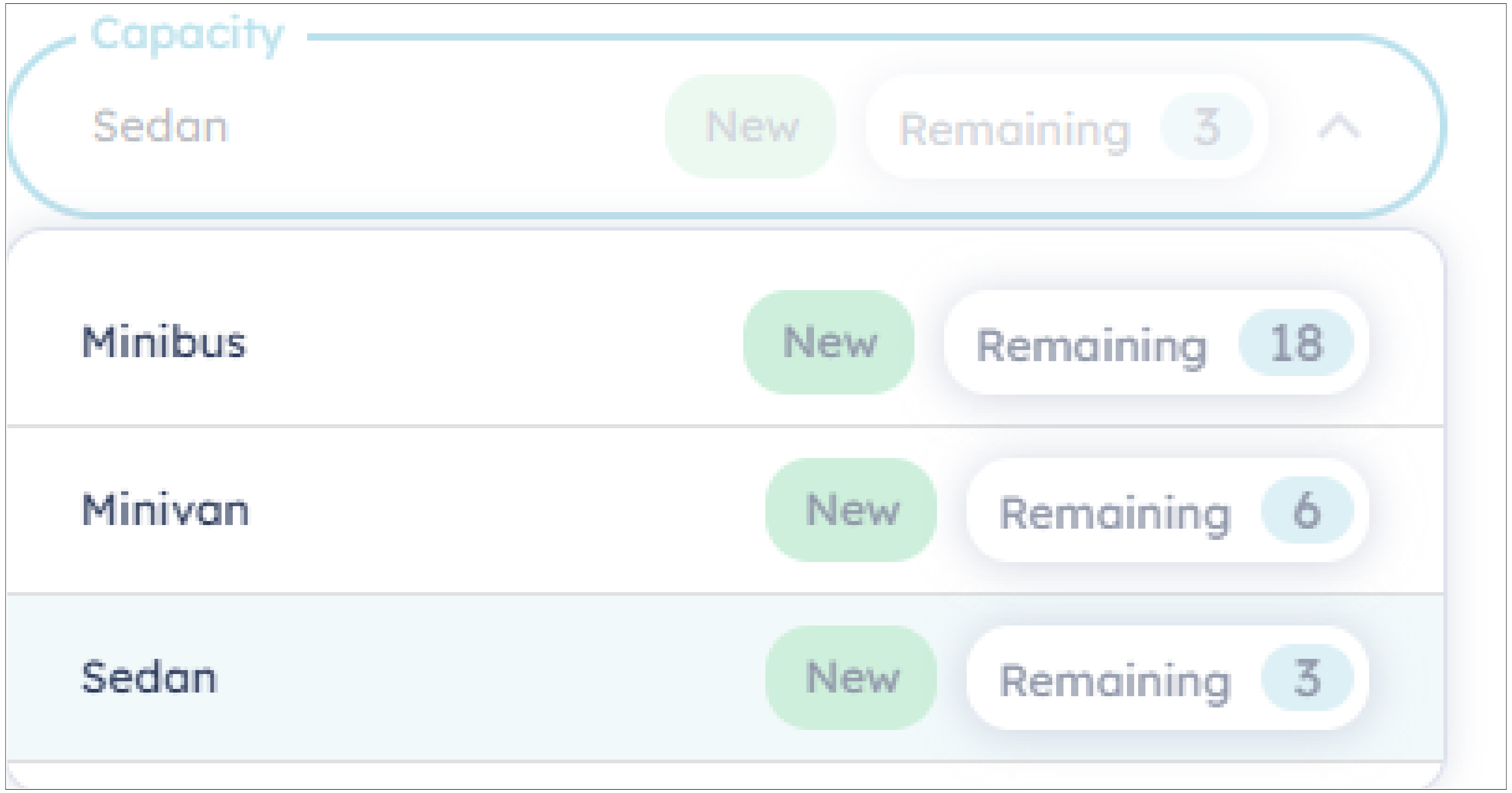


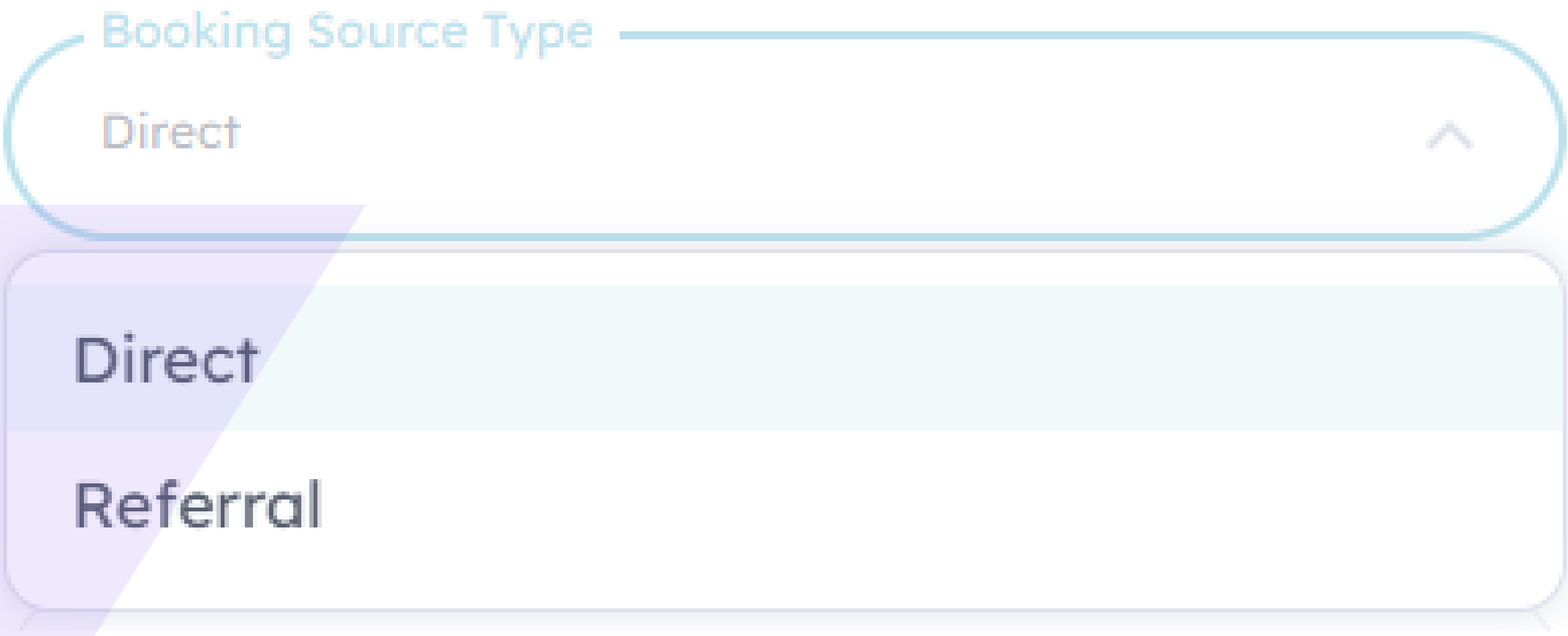
Click **Add Product Option** to include any product options you defined when creating the product. The product option pax can be reduced, but it cannot be increased beyond the number of pax in the original booking.

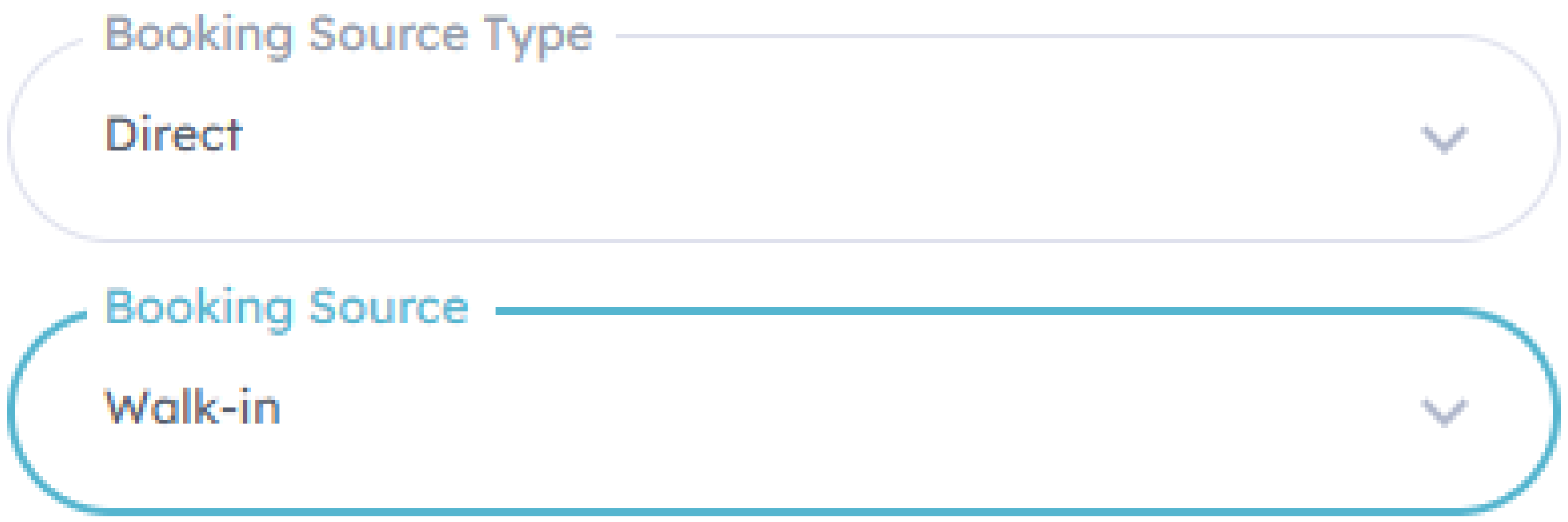
In the next step, you define the booking capacity. All available options must be set up during the product creation process.

In the case of a group tours, the **“New”** label will appear only when you are creating the first booking for that specific capacity. For all subsequent bookings, you will only see the remaining number of available seats. **Note:** The remaining number displayed does not reflect the availability at the moment of booking creation. Instead, it shows how many seats will remain after the current booking is created.



Booking Source is a mandatory field. First, you need to select the type: **Direct** or **Referral**, then choose the specific booking source.

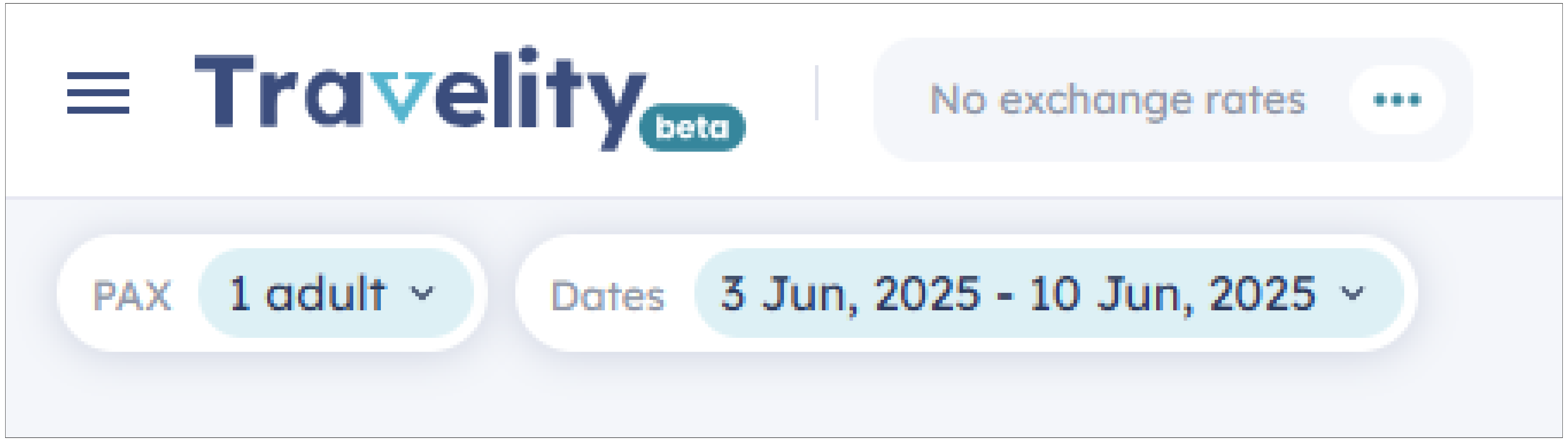




Note: All referrals must be added to the Team with the **“Partner”** role. Otherwise, you won’t be able to set them as booking sources.

The **PAX** section is disabled in the booking creation modal because the pax must be adjusted from the Availability Calendar. This ensures the availability engine updates correctly and counts the availability accurately.

Pax changes must be made from the Availability Calendar, as it directly updates availability counts.



In the next step, you must add the customer. To do so, you need their first and last name, along with either a phone number or an email address. If the customer is being added for the first time, you will see a **No customer found** message.

To add a customer, click the **“Add Customer”** button. In the modal that opens, fill in the customer's personal details.

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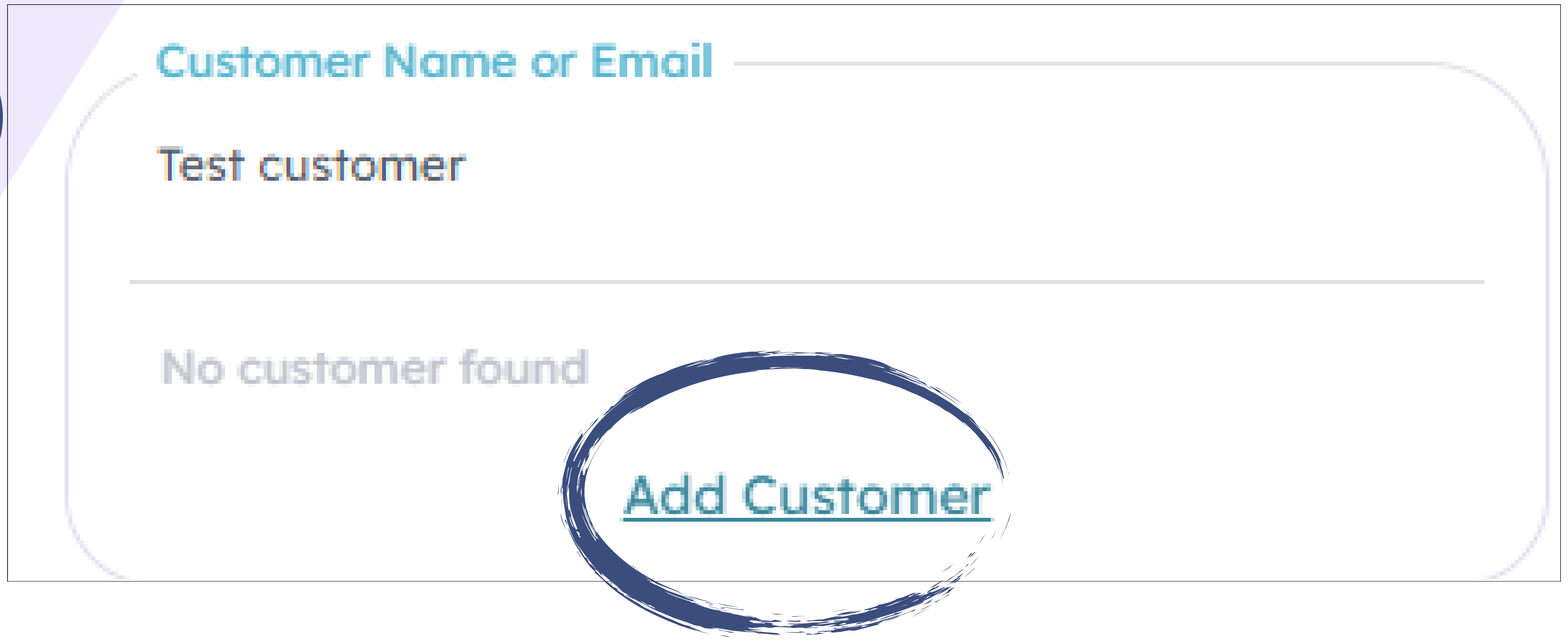

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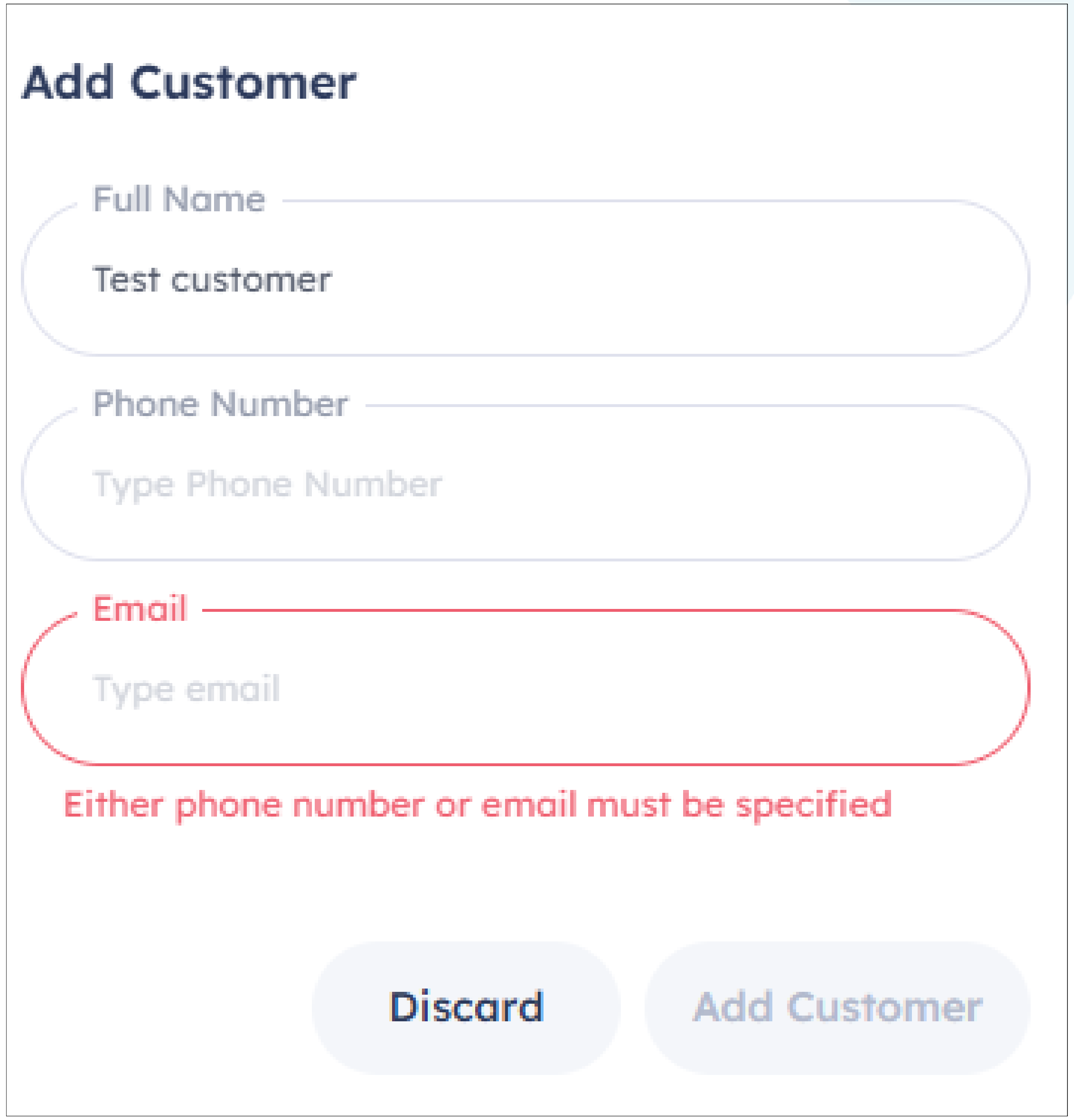

After entering all the required details, click **Add Customer**. Once added, when you search for the customer’s name, Travelity will suggest it automatically, so you won’t need to fill in all the details each time.

You can apply a **discount** to your booking either as a percentage or as a fixed amount in your currency.

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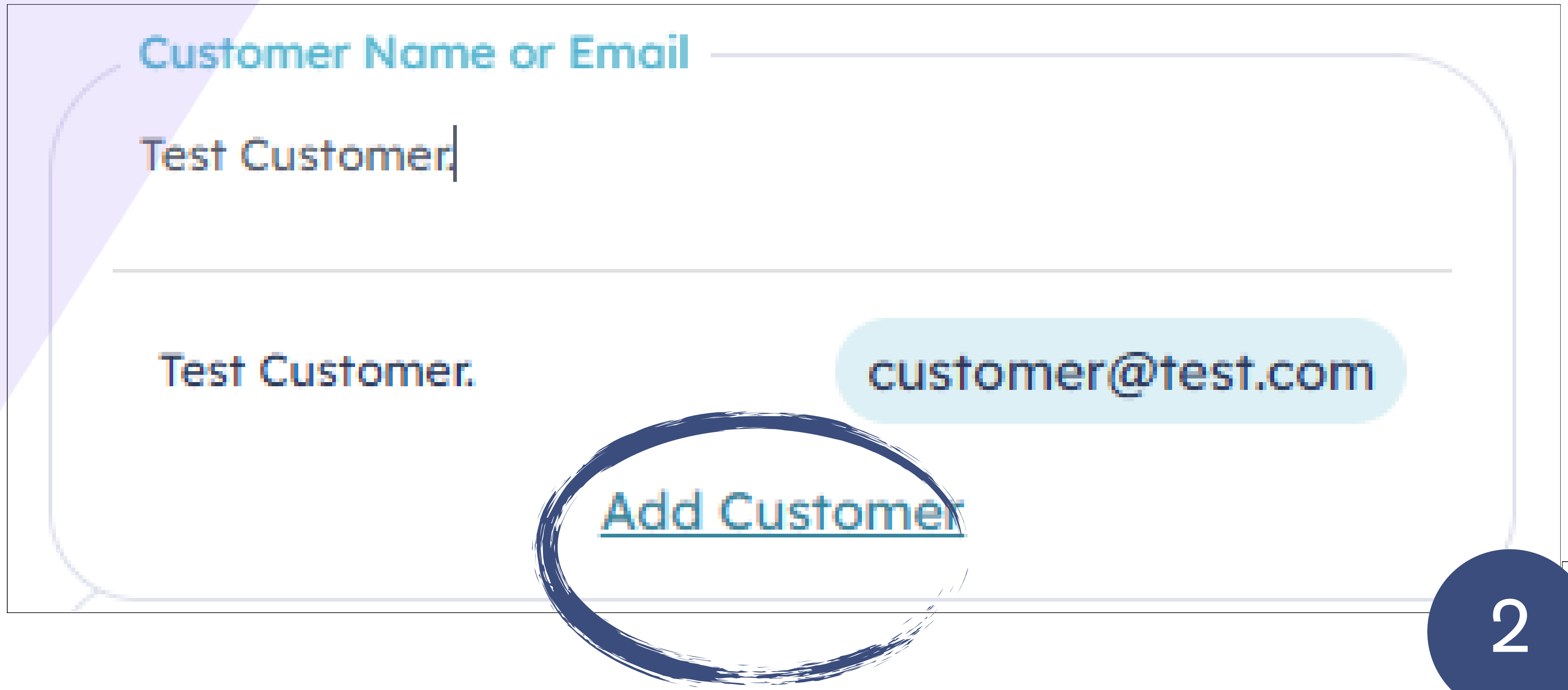

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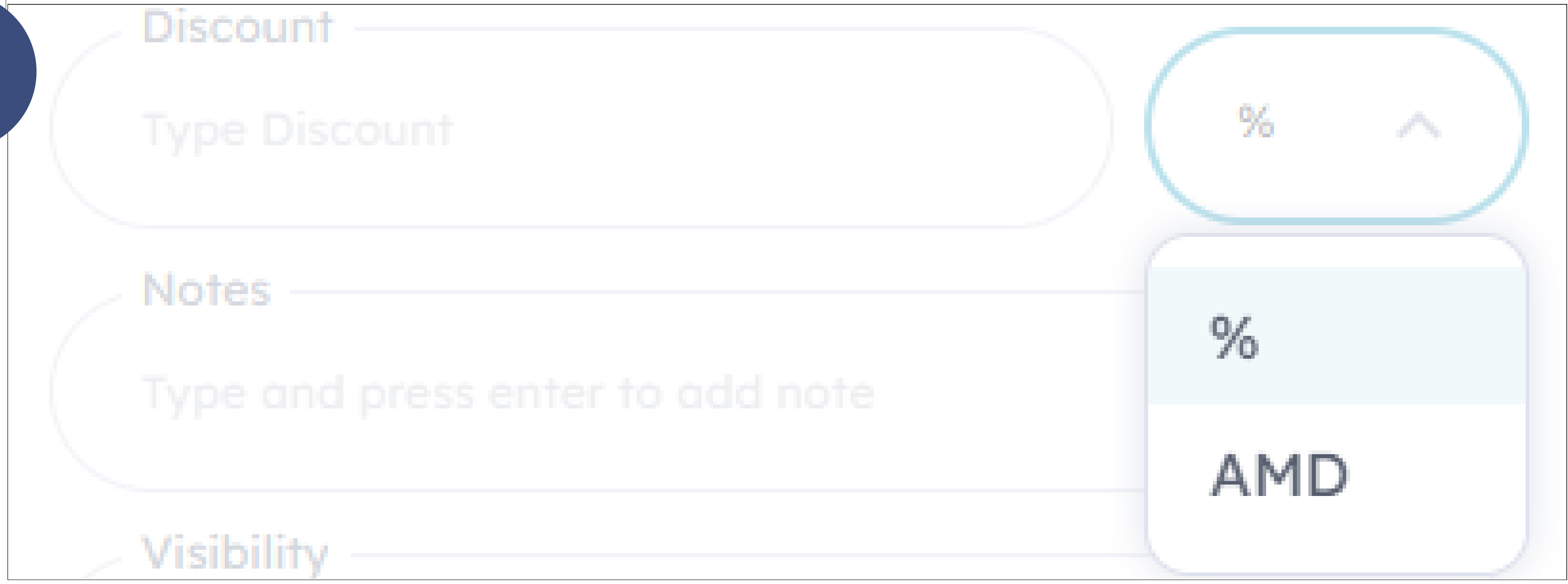
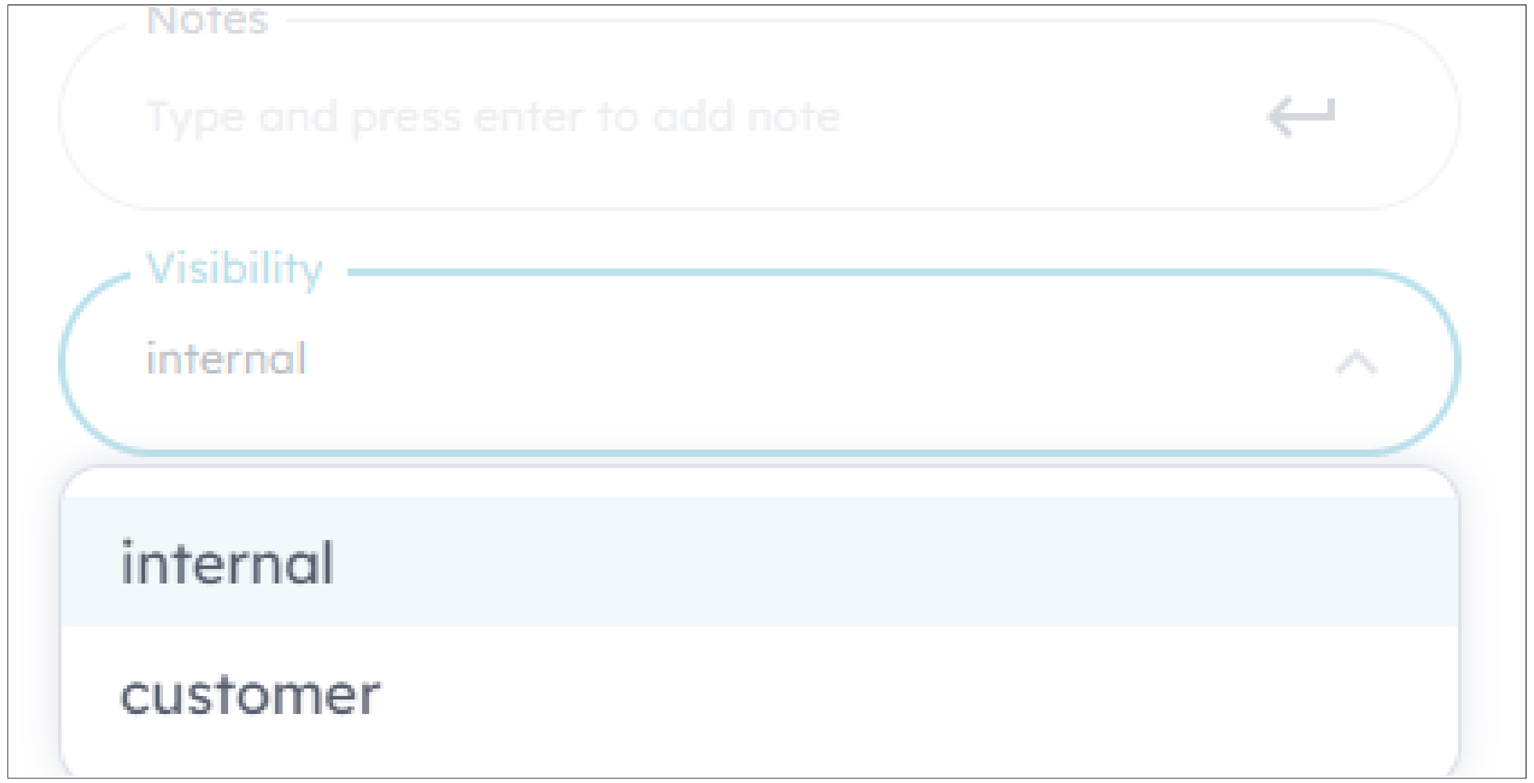


In the **Notes** section, users can choose between two types of visibility:

- **Internal Notes:** Visible only to team staff.
- **Customer Notes:** Visible to the customer and included in their order confirmation.



After completing all mandatory fields, the **Save as Draft** and **Confirm** buttons will become active. Click the option that suits your needs, and your booking will be saved accordingly.